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CITYWIDE TRAVEL BEHAVIOR SURVEY 1993

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San Francisco
Department of City Planning

CITYWIDE TRAVEL BEHAVIOR SURVEY 1993

SUMMARY FINDINGS PHASE II

VISITOR TRAVEL BEHAVIOR SURVEY RELEASED

The Department of City Planning, with funding assistance from the San Francisco County Transportation Authority and the San Francisco Public Utilities Commission, has released a major survey of visitor travel in San

Francisco. In addition to the survey of employee travel behavior released on interviews with about 10,000 visitors to restaurants, hotels, cultural sites, and institutions in the greater downtown also were surveyed. One who does not work at the site, so San Francisco residents eating at restaurants or visiting office buildings

will be the most comprehensive survey of visitor travel in San Francisco. It will help local transit and planning and better serve the needs of visitors to San Francisco sites and institutions.

The Department of City Planning also released a study of MUNI use based on the employee study and the visitor study. The study provided information pertaining to travel, transfer, and transit patrons. ■

Visitors to the Greater Downtown Include Many Bay Area Residents and Visitors From Beyond the Region

Visitors to sites in the greater downtown (Area 1 on Map) were more likely to travel from outside of the immediate area than were visitors to sites in other parts of San Francisco. Seventeen percent of visitors to greater downtown retail stores lived in the greater downtown; a total of 41% lived in San Francisco, 13% lived in the East Bay, 11% lived in the South Bay, 6% in the North Bay, and 29% lived outside of the Bay Area. Nine percent of visitors to greater downtown restaurants lived in the greater downtown; a total of 24% lived in San Francisco, 14% lived in the East Bay, 12% lived in the South Bay, 7% in the North Bay, and 42% lived outside of the Bay Area.

Visitors to the northwest part of San Francisco (Area 2 on Map) were more likely to be residents of that immediate area. Over half of the visitors to supermarkets, retail stores and restaurants in this area were area residents. Cultural sites in this area include the museums in Golden Gate Park, which attract visitors from all over the world, and some large movie theaters that draw visitors from beyond the immediate area. Nineteen percent of visitors to cultural sites were East Bay residents and 33% were from outside of



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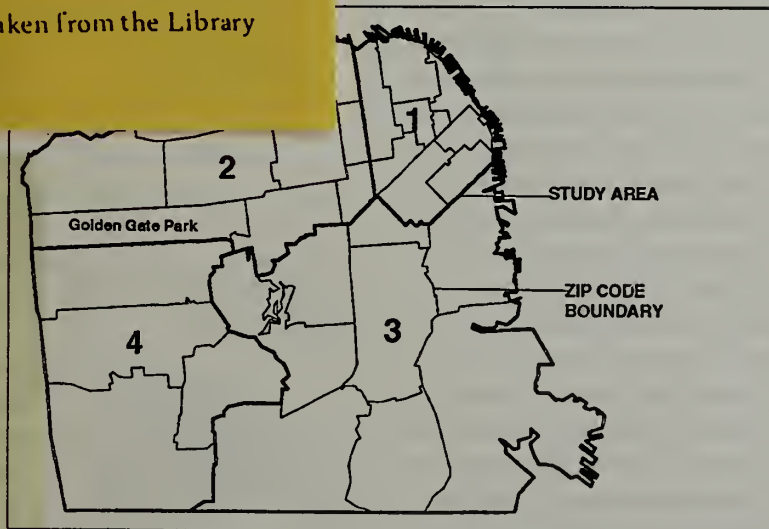
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SAN FRANCISCO STUDY AREAS



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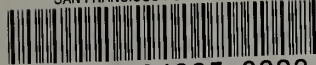
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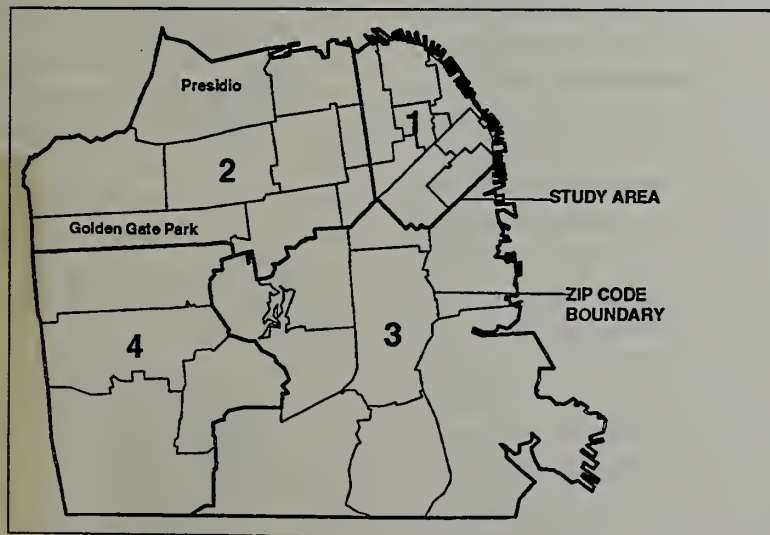
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PUBLIC LIBRARYSan Francisco
Department of City Planning**CITYWIDE TRAVEL BEHAVIOR SURVEY 1993****SUMMARY FINDINGS
PHASE II****VISITOR TRAVEL BEHAVIOR SURVEY RELEASED**

The Department of City Planning, with funding assistance from the San Francisco County Transportation Authority and the San Francisco Public Utilities Commission, has released a major survey of visitor travel in San Francisco. This study is a companion to the survey of employee travel behavior released in May 1993. It was based on interviews with about 10,000 visitors to retail stores, supermarkets, restaurants, hotels, cultural sites, and institutions citywide. Office buildings in the greater downtown also were surveyed. Visitors were defined as anyone who does not work at the site, so San Franciscans shopping in stores, eating at restaurants or visiting office buildings were surveyed.

This study is the largest, most comprehensive survey of visitor travel patterns ever conducted in San Francisco. It will help local transit and transportation agencies understand and better serve the needs of visitors to San Francisco's businesses, cultural sites and institutions.

The Department of City Planning also released a study of MUNI use patterns in San Francisco based on the employee study and the visitor study. The MUNI study includes detailed information pertaining to travel, transfer, and payment behavior of MUNI patrons. ■

SAN FRANCISCO STUDY AREAS***Visitors to the Greater Downtown Include Many Bay Area Residents and Visitors From Beyond the Region***

Visitors to sites in the greater downtown (Area 1 on Map) were more likely to travel from outside of the immediate area than were visitors to sites in other parts of San Francisco. Seventeen percent of visitors to greater downtown retail stores lived in the greater downtown; a total of 41% lived in San Francisco, 13% lived in the East Bay, 11% lived in the South Bay, 6% in the North Bay, and 29% lived outside of the Bay Area. Nine percent of visitors to greater downtown restaurants lived in the greater downtown; a total of 24% lived in San Francisco, 14% lived in the East Bay, 12% lived in the South Bay, 7% in the North Bay, and 42% lived outside of the Bay Area.

Visitors to the northwest part of San Francisco (Area 2 on Map) were more likely to be residents of that immediate area. Over half of the visitors to supermarkets, retail stores and restaurants in this area were area residents. Cultural sites in this area include the museums in Golden Gate Park, which attract visitors from all over the world, and some large movie theaters that draw visitors from beyond the immediate area. Nineteen percent of visitors to cultural sites were East Bay residents and 33% were from outside of

the region, while 15% were from the immediate area. This area also includes some large medical and educational sites. These institutional sites received relatively large proportions of their visitors from outside of the immediate area, but still within the region: 44% of these visitors were from other parts of San Francisco, 7% from the East Bay, 9% from the South Bay. Only 2% lived outside of the region.

Visitors to the southeast part of San Francisco (Area 3 on Map) were most likely to be residents of that immediate area. All sites (except for cultural sites) drew over half of their visitors from the immediate area. More than 75% of visitors to all land uses were San Francisco residents. About 10% of visitors of retail, large retail, supermarkets, and restaurants came from the South Bay. Less than 6% of visitors to any land use came from outside of the Bay Area.

Smaller retail sites in the southwest part of San Francisco (Area 4 on Map) were also strongly oriented to local residents. Sixty-eight percent of their visitors were residents of the immediate area, as were 46% of restaurant visitors. Over 86% of visitors to smaller retail stores, restaurants and supermarkets were San Francisco residents. Large retail, cultural and institutional sites attracted more out-of-town visitors (over 30%). These out-of-town visitors to large retail sites, some of which are in the Stonestown regional shopping center, were mostly from the South Bay. Nine percent of large retail visitors, 10% of cultural visitors, and 8% of institutional visitors came from outside of the region. ■

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Citywide travel behavior
survey 1993 : summary
[1993]

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PRIVATE AUTOMOBILES DOMINANT MODE FOR VISITORS OUTSIDE OF THE GREATER DOWNTOWN

In the greater downtown, less than half of the visitors to any land use drove or were auto passengers. Restaurant visitors were most likely to drive to their destination compared to visitors to other land use destinations: 47% of downtown restaurant visitors used autos. In the rest of nearly half of visitors to every type of site arrived in private automobiles, frequently more. The sites with the highest proportion of visitors using automobiles in areas outside greater downtown were large retail stores and supermarkets: over 80% of visitors to outlying large retail stores and over 67% of all visitors to outlying supermarkets used cars. Restaurants had among the lowest rates of auto use in the districts outside of the greater downtown: between 51% and 56% of restaurant patrons drove.



San Francisco every area arrived. The sites with the highest proportion of visitors using automobiles in areas outside greater downtown were large retail stores and supermarkets: over 80% of visitors to outlying large retail stores and over 67% of all visitors to outlying supermarkets used cars. Restaurants had among the lowest rates of auto use in the districts outside of the greater downtown: between 51% and 56% of restaurant patrons drove.

Visitor trips outside of downtown were more likely to begin at home than trips to downtown sites, as discussed on page 3. Home-based trips were more likely to be auto trips.

Throughout San Francisco, residents were less likely to drive to most kinds of sites in their immediate areas than were visitors from outside of the area. This is especially true of restaurants. Eighty-two percent of greater downtown residents visiting restaurants in their neighborhood used transit or walked, as did 57% of residents visiting restaurants in the southwest part of the City. Other areas fall between these two extremes. ■

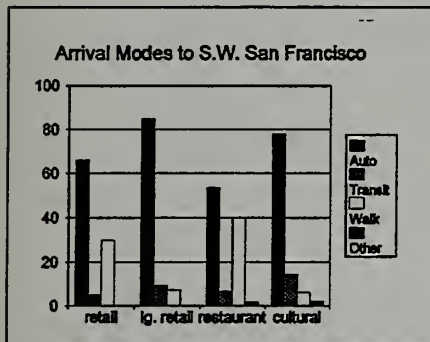
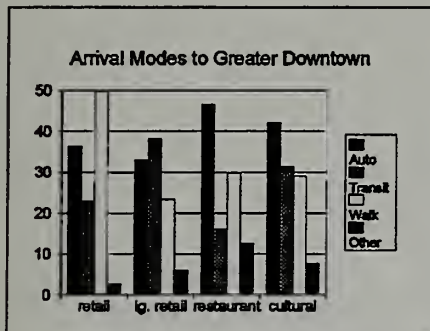
Transit use, walking, most common in the greater downtown, less prevalent elsewhere

Visitors to sites in the greater downtown were more likely to use transit or to walk than were visitors to any other part of the City. Thirty-eight percent of visitors to large retail stores in the greater downtown used transit and 23% walked. Over 25% of visitors to smaller retail stores, cultural sites, institutions, and offices in the greater downtown used transit. Over 25% of visitors to smaller retail stores, supermarkets, restaurants, hotels, cultural sites, institutions, and offices walked. The only sites in the northwest quadrant to which more than 25% of visitors used transit were cultural and institutional sites. Over 25% of visitors to stores, supermarkets, restaurants,

and cultural sites walked. Many of these walking and transit trips are made by downtown workers who visit downtown sites before or after work or during their lunch hours. These "trip linkages" are discussed on the next page.

In the southeast part of the City, only institutional sites had more than 25% of their visitors use transit; only institutional site and restaurant visitors walked more than 25% of the time. In the southwest part of the City, the highest rate of transit use was achieved by visitors to institutions (21% used transit). Visitors were most likely to walk to restaurants (40%) and retail sites (30%).

MUNI was by far the dominant transit carrier to all areas, representing between 9% and 24% of trips to downtown land uses and between 4% and 24% of trips to outlying land uses. BART was used for about 5% of



trips to most land uses in the greater downtown, and about 5% of trips to northwest area cultural sites (which include the museums in Golden Gate Park), and to restaurants, cultural, and institutional uses in the southeast part of San Francisco. No transit carrier, other than MUNI and BART, served more than 3% of any category of visitor trips.

Taxis were more commonly used to arrive at sites in the Greater Downtown than elsewhere in the City. The highest rate of taxi use was at downtown hotels: 15% of all trips. Visitor trips to land uses in the rest of San Francisco used taxis less than 2% of the time. One exception was institutional uses in Northwest San Francisco; 4% of those trips used taxis. ■

30% of visitors to greater downtown retail sites, large retail sites, supermarkets, restaurants and offices had come from home; so had between 45% and 50% of visitors to cultural and institutional sites and 14% of hotel visitors. Fifty percent of supermarket trips in the greater downtown were linked to other shopping visits.

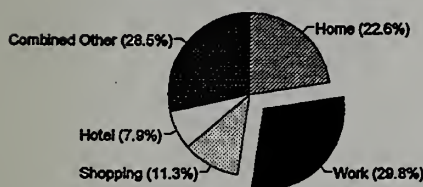
Visitors to sites in the rest of San Francisco were much more likely to have begun at home; over 34% of trips to all sites except hotels were home-based. Even so, many of their trips to stores and restaurants were from work: 14% of retail visitors and 26% of restaurant visitors had arrived directly from work. Even at large retail sites (over 50,000 square feet), which is the land use that people usually came to directly from home, 31% of the visitors had stopped at another store first and 14% had come from some other activity.

Citywide, more trips began at home than from any other single activity, like work or shopping. However, more than half of all trips did not begin at home. Retail, large retail and supermarket sites outside of downtown were most likely to be visited directly from home. Of the trips that did not begin at home, most retail, restaurant, and institutional trips came from work. Large retail and supermarket trips were more likely to be related to other shopping stops than to work. Trips to cultural sites were more likely to be linked to recreational trips than to work.

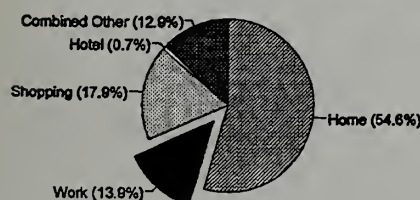
During the peak seasons (Labor Day weekend and the holiday shopping season), visitor trips were much more likely to be linked to hotels or recreation. Peak season visitors to all land uses, and especially to retail and restaurants, were much less likely to have come directly from work than visitors during the rest of the year. ■

MANY VISITORS TO STORES AND RESTAURANTS COME DIRECTLY FROM WORK

Visitor Trip Linkages to Downtown Retail Sites



Visitor Trip Linkages to Rest of San Francisco Retail Sites

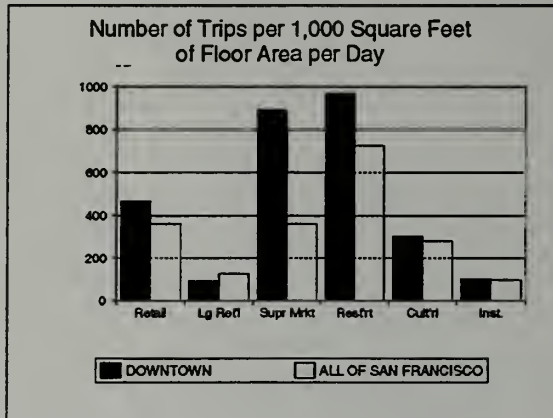


The visitor survey asked respondents: "Where were you before you came here?" Possible responses were "home," "work," "shopping," "school," "hotel," "recreation," and "other." If the site was their first destination, they would respond "Home;" if they had arrived directly from work, they would respond "Work." People visiting sites in the greater downtown were likely to have come to the sites directly from work, as would be expected in a major employment center. Thirty percent of visitors to retail stores in the greater downtown had come from work, as had 29% of visitors to restaurants. Fifty-four percent of office visitors had come from work, as had only 14% of visitors to cultural sites. Between 22% and

TRIP GENERATION RATES

The study calculated the average number of visitor trips per thousand square feet of floor area per day for each land use. (The number of trips to hotels was calculated per room.) On a citywide basis, institutional sites generated the lowest trip rates, at about 100 trips per 1,000 square feet per day. Large retail sites generated about 130 visitor trips per 1,000 square feet per day. Cultural, retail and supermarket sites each generated about 280 to 360 trips per 1,000 square feet per day. The highest City-wide trip rate was observed in restaurants, at 730 trips per 1,000 square feet per day. Hotels generated about 7 trips per room per day.

For most land uses, sites in the greater downtown generate a higher rate of trips than sites in the rest of San Francisco. The difference was largest for retail stores (with a rate 88% higher than the non-downtown rate), supermarkets (with a rate 3 times higher than the non-downtown rate), and restaurants (with a rate more than twice as high as the non-downtown rate). Large retail establishments outside of the greater downtown had a higher trip rate, perhaps because this category included some high-volume warehouse-type establishments. ■



MUNI TRAVEL STUDY

The PUC/MUNI report updates calculations used in determining the Transit Impact Development Fee (TIDF), as required by the TIDF ordinance. (The fee is assessed on new office developments in the downtown area to the cost of providing additional transit service created by them.) The average amount of space per worker in-matically in the past decade, from 276 square feet per 379 square feet per worker. The proportion of workers riding MUNI has increased, however. These changes another, so the net TIDF trip rate has not changed since the passage of the ordinance in 1981.



help offset those build-increased dra-worker to and visitors offset one substantially

The PUC/MUNI report also contains a comprehensive profile of MUNI riders citywide. For example, Fast Passes were used by 63% of downtown workers and 47% of people who work outside of downtown. In contrast, "BART Plus" passes were used by only 3% of MUNI riders citywide. Mean travel times to work among MUNI riders were about 45 minutes each way - which includes time waiting at transit stops and walking to and from stops as well as time on transit vehicles.

These survey results can be used to evaluate service changes. For example, 60% of MUNI riders systemwide transfer at least once; among downtown commuters, 42% transfer at least once. The overall proportion of transfer trips among downtown commuters has dropped, however, since the last major service improvements and transfer policy changes were made in the early 1980's. ■

HOLIDAY SHOPPING SEASON TRAVEL PATTERNS

The Primary Survey was conducted in fall 1992. Several largeretail sites included in the study were surveyed again during the period between Thanksgiving and Christmas, when more visitor trips would be expected. During the non-peak season, these sites attracted about 130 visitor trips per 1,000 square feet per day. During the holiday peak shopping season the same stores attracted about 190 trips per 1,000 square feet per day.

The visitors to these sites during the holiday season were slightly more likely to be San Francisco residents (62% during the peak holiday season and 59% during the rest of the year). They were slightly less likely to be visiting from outside of the region (13% during the peak season and 19% during the rest of the year).

During the holiday shopping season, visitors to these sites were less likely to walk (10% during the peak season and 22% during the rest of the year). The likely explanation is that a smaller proportion of them came directly from work. While about 35% of all visitors drove during both time periods, there were many more passengers in each car during the holiday season: 40% of visitors to these sites were auto passengers during the peak season while 27% of visitors were auto passengers during the primary survey. ■

Copies of the full Visitor Travel report are available at the Department of City Planning 450 McAllister St. SF 94102 6th Floor for \$6 or \$8 by mail. Copies of the Muni Travel Study are available for \$2 or \$4 by mail.